



Minutes of the 2nd Global Meeting, at Meesschaert & Partners, Brussels, April 23 – April 25, 2015

Partners present:			
Carina Benninga	Van Ede, Netherlands	Jerry Knock	Oasys FR, France
Erik Bernskov	HEL udvikling, Denmark	Geert Meesschaert	Meesschaert & Partners, Belgium
Jacques Bussy	Oasys CH, Switzerland	David Miles	OI Partners, USA (Virginia)
Damian Menzies	Choice Career Services, Australia	Alexander Müller	SKP, Germany
Paddy Collins	Torc, Ireland	Pat Pahucki	OI Partners, USA (Mas)
Corey Daxon	OI Partners, Canada	Patty Prosser	OI Partners, USA (Indiana)
Leo Dittmann jr.	Dittmann Consulting, Czech Republic	Susan Ruhl	OI Partners, USA (Colorado)
Bernardo Entschew	De Bernt Entschew, Brazil	Shawna Simeik	OI Partners, USA (Colorado)
Hans Fiedler	Placement Group, Austria	Ling Tyler-Bennett	HDA, United Kingdom
John Fitzgerald	OI Partners, Ireland	Thom Wharton	OI Partners, USA (Rhode Island)
Steve Ford	OI Partners, USA (Mas)	Lisa Widmann	OI Partners, USA (Rhode Island)
Claudia Gentner	OI Partners, USA	Alied de Cock	Company Secretary CNI, A'dam (NL)
Hans-Ulrich Hay	Humanus, Spain & Portugal		

Minutes Brussels OIGP global meeting (April 23 – April 25, 2015)

1. Welcome

The Chairman, Jerry Knock, welcomes everyone, especially long travelers from the USA (OI Partners), Brazil (Bernardo Entschew) and Australia (Damian Menzies).

The Chairman thanks the hosts, Geert Meesschaert and his wife Annemie for their help in organizing the meeting and their great hospitality. He also explains the goal of the meeting ‘Taking OIGP to the next level: Working together to build a valued partnership’.

2. Intro Practices Discussion

Patty Prosser and Steve Ford give an intro on the Practices Discussion. The goals of the discussion are a.o.:

- 2.1. To learn from each other
- 2.2. To understand the client needs
- 2.3. To know each other’s individual strengths and the collective strength
- 2.4. To make progress on how to work together.

3. Practices Discussion

Thanks to Damian Menzies’ format almost everyone had prepared a Power Point doc to present his/her firm. The group showed a very interesting spectrum of businesses and possibilities for product development and PR.

Presentations will be available on both CNI- and OIGP-Intranet. Missing presentations will be prepared and sent to Allied.

Some general trends:

- 3.1. All over (small) recovery of the economic situation.
- 3.2. Different markets per continent, in USA the retail market seems to become more and more important.
- 3.3. Use of Social Media very well developed by some partners, giving good business.
- 3.4. Different product developments:
 - a. Everyone is using e-support as part of a program.
 - b. Partners in USA getting away from classical OP as prices are totally cannibalized due to ‘e-OP’.
 - c. Partners in USA thus putting more emphasis on (exec) Coaching, Assessments and also Leadership Development in a context of rapidly growing small companies, succession challenges etc.
 - d. The other Partners still do a lot of OP (lower pricing since the crisis and sometimes also because of government interventions), but also Coaching.
 - e. New developments for new target groups, e.g. the ‘never retiring’ baby boomers and generations to come (what are you going to do as from now for the next years?), ‘new start-ups’, ‘young internationally growing companies’ etc. or the (future) well educated unemployed.

- 3.5. Some partners do Business Development themselves; others have a special sales organization; referrals are via clients (HR managers) or related branches, e.g. attorneys.
- 3.6. Some partners offer also financial services related to employment and retirement.
- 3.7. Some partners consider re-branding and different brands for different products.
- 3.8. Creative PR helps a lot to differentiate your company.
- 3.9. Tendency for shorter (OP related) programs.
- 3.10. Pricing shows:
 - a. Unity in 'low end' (OP) programs: ca. € 1.500,- to € 8.000,-
 - b. Unlimited OP ('high-end'), for execs, percentage (10-30%) of annual salary
 - c. Many differences in pricing for Coaching etc., a fixed price or per hour
 - d. Recruitment is much more profitable.

4. Guest speaker

The guest speaker, John Crombez, had an interesting presentation on 'Risk, confidence and employment'. John Crombez is professor in economics at the University of Louvain and politician, see also (in Dutch): http://nl.wikipedia.org/wiki/John_Crombez.

5. Referral business

- 5.1. Allied de Cock made an overview of the referral business Q1 (2015). To be added:
 - a. Two referrals to Ling (HDA) from two US firms
 - b. Jim Wilson's (Gateway Int.) RFP re AMEX.

Allied will send an update.

- 5.2. RFP's could be written by professionals

Action

- 5.3. Invoicing: everyone referring should send info to 'Headquarters' in order to invoice, as applicable, to OIGP or CNI.

6. OIGP Tools

Claudia Gentner gave a presentation on the OIGP tools (see presentations):

- 6.1. OI Solutions (Abintegro portal + CCM (back office))
 - a. Client Dashboard. The group agreed that consultants keep client/candidate sensitive notes out of OI Solutions, but separately. Also because of security rules.
 - b. Certain reports can be 'customized' and a 'program' described as 'project' can be amended with a satisfaction measurer (through questionnaires)

- c. Staff Database, based on the Competency Survey of 2,5 years ago. Everyone with an OIS account can upload his/her picture and credentials. In this moment 30 partners/consultants are registered. The ‘administrator’ can search on certain aspects to support RFP’s.
- d. Everyone can get an OIS account, via Claudia and Alied
- e. Claudia made an instruction video about OI-Solutions. Video is also sent to all CNI members on Oct. 31, 2014.

6.2. OIGP website, **actions**

- a. Everyone is invited again to give amendments to his/her own partner page to Alied
- b. In order to get better Google ranking: be active in OIGP LinkedIn group (s), send tweets (managed by Susan Ruhl and Shawna Simcik), feed blogs, be on Facebook etc.
- c. Everyone has access to the OIGP Partner Login (OIGP Intranet); if access codes are lost, they can be asked from Alied and/or Claudia.

7. **Joint Business development – how to get OIGP projects (Damian)**

Damian gives an intro, followed by discussion, some remarks:

- 7.1. WHY: ‘We are here to grow our business and to build strong relationships with clients’. See also his presentation (encl. 7).
- 7.2. WHAT ‘global issues’, what clients (internationally) desire as products, e.g.: OP, coaching, (international) leadership development, succession matters.....
- 7.3. WHAT ‘global solutions’ by OIGP:
 - a. need for ‘standard OIGP processes (methodologies) with local customization’
 - b. consistency in deliverables, but....every certifying institute uses other methodologies
 - c. OP and coaching, but....competencies for OP differ from those for coaching
 - d. Four types of coaching: derailment coaching, growth and development, general leadership, project management.
- 7.4. HOW to approach clients, How to build credibility and authority to solve the issues:
 - a. It is all about ‘trust’
 - b. How to get the first assignment and build a reputation, the first two visits the most difficult
 - c. OIGP Client events

General discussion followed by group discussions to formulate ‘questions’ to ask (potential) clients. Results for questions about developing (international) leadership, see encl. 8.

Action:

The partners agree on having two conversations to get OIGP referral business **before July 1, 2015**. Feedback e.g. on LinkedIn (OIGP Group, ask Tom Wharton). Bernardo Entschew suggests ‘speed dating’ with 2-3 partners exchanging ‘clients’.

8. Joint Business development – RFP’s (Bernardo)

Bernardo gives a presentation on a smoother RFP process within OIGP. See his presentation (encl. 9). Remarks:

- 8.1. Pricing and a minimum of programs have to be ready and updated
- 8.2. Insurance matters have to be clear
- 8.3. OIGP isn’t (yet) a legal entity, contracts will be made between legal entities. Steve Ford will explore legal issues for OIGP.

9. OIGP International Coverage (‘White Spots’)

Jerry stresses the importance of the development of the Network. We need more coverage for commercial reasons and to lower the fees.

Actions:

- 9.1. Bernardo: Latin America is growing, except for Argentina. Brazil is ‘stable’. Bernardo and Steve will co-operate on South- and Central-America to find new partners. The market anyhow is more ‘recruitment’ than ‘OP’.
- 9.2. Far East: Steve will go on talking to OI’s Singapore. China is OK (Beijing, Shanghai and also Hong Kong), mostly in ‘coaching’. Japan is a ‘real’ white spot, difficult to get contacts.
- 9.3. India: Steve has a couple of contacts. Key areas are Mumbai and Bangalore. Steve will go on, but it is a difficult market. Jerry points out that Nigel Cumberland (Dubai) has an Indian partner in Bangalore. Jerry will approach Nigel.
- 9.4. Geert will invite his Turkish connection (Trigon) for our next meeting. Trigon has subsidiaries in Istanbul, Ankara, Bursa and soon Izmir.
- 9.5. Erik will go on developing the Nordic countries.
- 9.6. Bernardo will talk to the AIMS partner in Poland.

10. Next meeting

The next OIGP global meeting will be held in Toronto, Canada, around end of April 2016. Corey Daxon of Feldman Daxon Partners will be our host. And the next CNI meeting will be held in Berlin, September 10-12, 2015, hosted by Alexander Müller of SKP. Everyone is Welcome!

11. Actions

Everyone

- 11.1. sends referral info to ‘Headquarters’ in order to invoice, if applicable, in favour of OIGP or CNI.
 - 11.2. checks his/her partner page on OIGP.com
 - 11.3. completes his/her profile on OI Solutions (ask Claudia Gentner)
 - 11.4. tries to be active on OIGP social media (ask Tom Wharton)
 - 11.5. gives feed back on **two conversations** to get OIGP referral business **before July 1, 2015**
 - 11.6. looks for new partners, specifically see pt 9 ‘White Spots’
- and
- 11.7. Corey Daxon will organize our next Global Meeting.

12. Enclosures (all docs on **OIGP.com** via *Partner login (PRC)/Meetings held* and on CNI Intranet under *Documents/CNI Meetings/Brussels April 2015*:

1. Practices Presentations
2. Format Practices Presentations by Damian Menzies (CCS)
3. Case UM by Ling Tyler-Bennett (HDA)
4. Presentation guest speaker, John Crombez
5. Referral Overview Q1 of 2015
6. Presentations Claudia Gentner on OI Solutions and PRC
7. OIGP BD session presentation by Damian Menzies (CCS)
8. Questions for Clients re leadership gaps (see also below)
9. OIGP BD session presentation by Bernardo Entschew (DBE)
10. Directory of OIGP offices.

Encl. 8:

Client problem – identifying and managing the next leaders in my organization,

as discussed during Brussels meeting on April 25, 2015 (with thanks to Damian Menzies)

The following scenarios are designed to stimulate a conversation either with an existing client or prospect. The purpose of the scenarios is to create a situation whereby the client / prospect recognizes they have some issues and require some external input to more effectively manage the situation.

These scenarios are not designed with a premeditated solution in mind. We, as OIGP, are recognized for our ability to design and deliver a customized solution for our clients. The technical solution will be designed after the nature of the problem is identified.

Before meeting with any client / prospect we need to establish the following:

1. They are international
2. They have some appetite for using external resources
3.

Assumptions (with existing company)

1. What are you doing today to identify and develop your next generation of leaders?
2. What do you do locally and globally?
3. What does success look like in that process?
4. How is it measured?
5. Is your process integrated with the performance management process?
6. Is it aligned to delivering the strategic business goals?
7. Who has these conversations with your future leaders?
8. How competent are they in these communications?
9. Do you have similar experiences in local and international operations?
10. What would you like to see done differently?
11. How do you solve these challenges?

Assumptions – prospect (nothing in place, this is the audience that might not be the decision maker)

1. Where do you expect to be in the next 3-5 years?
2. What will that look like?
3. How do you measure success?
4. What are the gaps in your executive team?
5. How do these gaps impede you from achieving your objectives?
6. Do you open in country with expats or locals and what problem(s) does this present?
7. How do you solve these challenges?
8. What specific issues does your CEO have in taking the business international?
 - (Add example by saying that we have a German coach that might be able to support you / how are you developing your current managers for the move?)

Our challenge !

To have 2 conversations by 2nd July, 2015.

To make this task easier, it may be best to approach one of your OIGP partners and discuss an approach for a specific client (for example, I have a prospect in Australia – Cochlear – who have their US headquarters in Denver, I can speak with Susan/ Shawna to develop an approach).